CLASS TITLE: TAX RETURN PROCESSING OPERATOR III (TAXATION)

CLASS DEFINITION:

GENERAL STATEMENT OF DUTIES: Within the Department of Revenue (DOR) Division of Taxation, to perform a variety of mail processing, data entry functions, worklist reviews, scanning functions, and account reconciliations; to receive, sort, open, and properly distribute the incoming mail; to perform a wide range of data entry functions from basic to the most complex as well as to scan, prepare and batch a variety of tax documents and payments; to assist in working on review queues; to unsuspend returns and payments, review bank accounts, and compare data to file loads; to do related work as required.

SUPERVISION RECEIVED: Works under the broad supervision and/or professional guidance of a Tax Return Processing Supervisor from whom general work assignments are received; work is occasionally reviewed upon completion for accuracy and conformance to accepted principles, instructions, laws, rules, and regulations.

SUPERVISION EXERCISED: To assist a supervisor in acclimating new employees to the job duties, managing unit assignments and completion of work; to participate in and administer formal training to staff; and to perform other lead tasks as assigned.

ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:

Within the Department of Revenue (DOR) Division of Taxation, to perform a variety of mail processing, data entry functions, worklist reviews, scanning functions, and account reconciliations.

To receive, sort, open, and properly distribute the incoming mail.

To perform a wide range of data entry functions from basic to the most complex as well as to scan, prepare and batch a variety of tax documents and payments.

To assist in working on review queues.

To unsuspend returns and payments, review bank accounts, and compare data to file loads.

To reconcile various electronic sources and bank deposits including, but not limited to, daily credit card files, ACH debit portal, ACH credits and Bank lockbox.

To process all Authorization Agreement Forms for Electronic Funds transfers.

To scan, upload and maintain documents in accordance with standard procedures.

To be responsible for the review and correction of incorrectly supplied missing information in order to prevent electronic records from posting correctly to taxpayers accounts; this requires directly contacting taxpayers who are using the incorrect information, educating those taxpayers as to the correct procedures, and ensuring that they are able to prevent the mistake from reoccurring in the future.

To process worklists by source to identify filing errors made by taxpayers; to contact taxpayers and rectify future filing concerns.

To monitor and process requests from all payroll companies regarding maintenance of withholding accounts and verifying withholding filing frequency for administration.

To correct unsuspend errors and make adjusting entries on worklists.

To address and rectify worklist(s) for suspended items that require additional research from sources other than the scanner.

To research and work to resolve all bad records, and to work directly with taxpayers and financial institutions to get payments to post.

To identify transactions that are reversed by the bank or a financial institution and to update deposit totals.

To train staff on various functions.

To address and resolve cases that are error-prone; to resolve highly complex cases, ensuring excellent customer experience and resolution of taxpayer issues.

To reconcile Electronic Fund Transfer (EFT) issues, and to assist other units in locating missing payments, ACH credit, Lockbox, Checks and Credit Card payments.

To process checks with no form, multiple forms and processing levies for the Collections department.

To contact taxpayers regarding payment reversals through the Tax portal in order to rectify future filing concerns.

To maintain customer confidence and protects operations by keeping information confidential.

To contributes to team effort by assisting with and accomplishing related results as needed.

To participate in group projects and special assignments as needed.

To do related work as required.

REQUIRED QUALIFICATIONS FOR APPOINTMENT:

KNOWLEDGE, SKILLS AND CAPACITIES: Advanced knowledge of the forms, processes and transactions of an assigned tax section; advanced knowledge of collection processes and payment methods; an advanced ability to data enter tax forms with speed and accuracy; the ability to resolve a wide variety of taxpayer problems and inquiries; the ability to clearly convey a variety of information in person, by telephone or by e-mail; the ability to utilize computer software and databases in completing tax transactions and interpreting data; knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; the ability to interact with taxpayers, the public and co-workers in a professional, tactful and courteous manner; the ability to follow verbal and written instructions and to review and enter tax-related forms and documents; the ability to assist in guiding, coaching, and training staff; and related capacities and abilities.

EDUCATION AND EXPERIENCE:

Education: Possession of an Associate's degree from a college of recognized standing; and
Experience: At least four (4) years of employment in processing tax documents and operating data entry equipment.
Or, Possession of an Associate's degree from a college of recognized standing and at least five (5) years of experience performing a variety of moderate to complex office support involving customer-facing service and computer-based tasks involving the Microsoft Windows suite of software programs.

Class Created: November 21, 2021